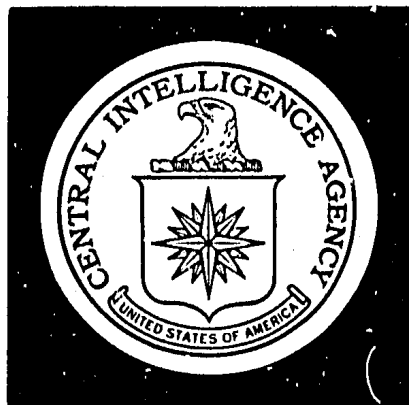


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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping To North Vietnam During March 1970

~~**Secret**~~

ER IM 70-54
April 1970

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Foreword

All data are preliminary and subject to minor changes as additional information becomes available. These changes usually involve ship arrivals and cargoes from Communist China and, to a lesser extent, cargoes carried by ships of the Free World. Data for the preceding month and monthly averages presented in the tables have been adjusted to reflect corrections and additions. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
April 1970

INTELLIGENCE MEMORANDUM

Shipping To North Vietnam
During March 1970

Highlights

North Vietnam's seaborne imports in March rose slightly to 166,000 tons, bringing first quarter totals to the highest level on record. Imports from the USSR in March reached a record volume of 126,300 tons. Foodstuff imports, principally from the USSR, increased to 62,200 tons, the highest amount since June 1969. Petroleum imports, all from Soviet Pacific ports, were up sharply to 41,100 tons, about one-third higher than the monthly average in 1969. Three small consignments of probable military-related cargoes arrived from Black Sea ports.

Imports from Communist China remained sluggish, rising only slightly to 30,100 tons, whereas imports from the Free World were the lowest in 15 months. There were no imports from Cambodia for the first time since August 1969, nor were there any shipments to Cambodia.

Seaborne exports during March dropped sharply to 27,000 tons, reflecting the lowest level of coal shipments since September 1967. Exports for the first quarter of 1970, however, were off only 13% from the first quarter of 1969.

Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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Import Patterns

1. The record volume of seaborne deliveries from the USSR in March provided 76% of North Vietnamese imports and included a new high in foodstuff shipments for the fourth consecutive month (see Tables 1 and 2). The substantial increase in imports from the USSR more than offset declines in imports from other areas. A Cuban ship, *Aracelio Iglesias* (11,787 DWT), which was due to arrive in Haiphong in mid-March, ran aground and sank off Hainan Island, less than a day away from Haiphong, with a cargo of sugar. Imports from Communist China rose slightly but remained at depressed levels with deliveries of foodstuffs amounting to only 10,600 tons, about one-third of the monthly average in 1969. There were no imports of Cambodian timber, which amounted to 11,400 tons in February.

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Sharp Drop in Exports

3. Coal exports in March declined to 14,800 tons (see Tables 3 and 4), their lowest level in 2½ years. All of the shipments went to Japan, and none went to China, usually a major recipient. The small volume of apatite exports went only to North Korea, which has been virtually the only customer for this commodity since shipments were resumed in August 1969. About 1,700 tons of rice were shipped to Singapore. Cement exports continued at a trickle, and thus far in 1970 all of them have gone to Hong Kong; none went to Cambodia, the principal buyer in 1969.

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Situation at Haiphong

4. Improvement of facilities at the new extension of the Chamber of Commerce Wharves continues. Thus far, three portal cranes have been observed in the immediate wharf area, one in operation and two under assembly. Soviet technicians directing the assembly of the cranes have reportedly stated that a total of six cranes will eventually be installed in the port area. In addition, a mobile railway crane, which appears to be a modified truck-mounted model, has been observed recently on spur tracks in the port area.

5. Congestion at Haiphong cleared up temporarily in mid-March, but worsened considerably toward the end of the month, when arrivals (see Table 5) of Soviet vessels increased abruptly. For the month as a whole, the average number of foreign dry cargo ships in port per day dropped from 17 to 15 and the average layover time rose from 14 to 17 days (see Tables 6 and 7). The discharge rate for foreign dry cargo ships in Haiphong rose for the third consecutive month to 4,800 tons per day, its highest level since December 1968.

Record Imports for First Quarter

6. Seaborne imports to North Vietnam during the first quarter of 1970 were the highest of any first quarter on record. Although total deliveries of cargo from Communist countries were virtually the same as in the first three months of 1969, imports from the USSR were 54% higher. This more than compensated for the precipitous drop in imports from Communist China, as shown in the following tabulation:

Thousand Metric Tons										
Origin	Total		Foodstuffs		Fertilizer		Petroleum		General and Miscellaneous	
	Jan-Mar		Jan-Mar		Jan-Mar		Jan-Mar		Jan-Mar	
	1970	1969	1970	1969	1970	1969	1970	1969	1970	1969
Total	486.7	478.9	170.0	234.3	48.0	15.0	104.2	91.1	166.6	138.6
Communist	463.3	464.5	170.0	234.2	37.5	15.0	104.2	91.1	151.7	124.2
USSR	339.6	221.0	136.5	97.0	28.9	10.3	102.7	69.7	71.5	44.0
China	75.7	173.6	25.3	135.2	--	--	1.5	9.9	48.9	28.6
Other a/	48.0	69.9	8.2	2.0	8.6	4.7	--	11.5	31.3	52.6
Free World	22.4	14.4	0	0.1	8.5	0	0	0	13.8	14.3

a. Including North Korea, Cuba, and various East European countries.

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Foodstuff Deliveries

7. Foodstuff imports during the first quarter (170,000 tons) were well below the level during the same period in 1969.* Imports from Communist China, which have been depressed since September 1969, were less than one-fifth their level in the first quarter of 1969. Wheat and wheat flour from the USSR have only partly replaced declining imports of rice from South China and of corn and other food products from North China. Although shipments of foodstuffs from the USSR have been at record levels in 1970, they are running behind the announced goal for the year of 50,000 tons a month.

Other Imports

8. Imports in each of the other major categories were higher in the first quarter of 1970, primarily because of increased deliveries from the USSR. Imports of petroleum were up nearly 15% to 104,200 tons, the highest first-quarter total in at least six years. There are indications that petroleum imports will be even greater during the coming quarter. Fertilizer imports were over three times those of the first quarter of 1969, reflecting substantially higher deliveries from the USSR, North Korea, and Japan.

Cutback in Coal Shipments

9. Although total seaborne exports were only 13% lower during the first quarter than in the corresponding period of 1969, coal exports dropped by nearly 40% to their lowest first-quarter level since at least 1964. As shown in the following tabulation, most of the drop in coal exports was in shipments to Communist China:

* *Seaborne imports of foodstuffs for all of 1969 accounted for less than 20% of total foodstuff consumption in North Vietnam.*

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Thousand Metric Tons						
Destination	Total		Coal		Other	
	Jan-Mar		Jan-Mar		Jan-Mar	
	1970	1969	1970	1969	1970	1969
<i>Total</i>	150.8	173.4	99.3	164.4	51.5	9.0
Communist China	46.4	101.8	45.9	100.3	0.5	1.5
Japan	49.4	59.7	48.2	59.1	1.2	0.6
Other	55.0	11.9	5.2	5.0	49.8	6.9

10. Exports of apatite, which were resumed in 1969 and reached 11,000 tons in December 1969, continued at a somewhat reduced monthly average (8,700 tons) during the first quarter of 1970. Nearly all of the apatite exports went to North Korea. About 5,100 tons of cement were shipped to Hong Kong, and 3,600 tons of rice were shipped to Hong Kong and Singapore.

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Table 1
Seaborne Imports, by Origin and Commodity
1970

Thousand Metric Tons										
Origin	Foodstuffs		Fertilizer		Petroleum		General and Miscellaneous		Total	
	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb
<i>Total</i>	62.2	53.9	15.1	15.4	41.1	31.5	47.7	58.9	166.1	159.8
Communist	62.2	53.9	13.6	11.9	41.1	31.5	47.0	52.4	163.8	149.7
USSR	51.4	42.5	11.0	9.0	41.1	30.8	22.8	24.4	126.3	106.6
Eastern Europe	0.2	Negl.	1.6	--	--	--	4.4	13.2	6.1	13.3
China	10.6	7.3	--	--	--	0.8	19.5	14.7	30.1	22.8
North Korea	--	--	1.0	3.0	--	--	0.3	Negl.	1.3	3.0
Cuba	--	4.0	--	--	--	--	--	Negl.	--	4.0
Free World	0	0	1.5	3.5	0	0	0.8	6.5	2.3	10.0
Japan	--	--	1.5	3.5	--	--	0.7	--	2.2	3.5
Cambodia	--	--	--	--	--	--	--	5.9	--	5.9
Other Free World	--	--	--	--	--	--	0.1	0.6	0.1	0.6

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Table 2
Seaborne Imports, by Flag and Commodity ^{a/}

Flag	March 1970					Thousand Metric Tons	
	Foodstuffs	Fertilizer	Petroleum	General and Miscellaneous ^{b/}	Total	February 1970	Monthly Average Jan-Feb 1970
<i>Total</i>	62.2	15.1	41.1	47.7	166.1	157.2	159.8
Communist	54.1	15.1	41.1	37.2	147.5	135.2	140.8
Soviet	51.4	12.0	41.1	23.3	127.8	105.3	111.2
East European	0.2	3.1	--	4.9	8.2	6.4	11.5
Chinese	2.5	--	--	9.0	11.5	15.5	12.6
Cuban	--	--	--	--	--	8.0	4.0
North Vietnamese	--	--	--	Negl.	Negl.	Negl.	1.5
Free World	8.1	0	0	10.5	18.6	22.0	19.0

a. Identified imports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

b. Including unidentified cargo of 21,086 metric tons.

Table 3

Seaborne Exports, by Destination and Commodity
1970

Thousand Metric Tons

Destination	Coal		Cement		Apatite		Rice		General and Miscellaneous		Total	
	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb	Mar	Monthly Average Jan-Feb
Total	14.8	42.2	0.5	2.3	7.8	9.2	1.7	0.9	2.3	7.2	27.2	61.8
Communist	0	23.0	0	0	7.8	9.2	0	0	0.7	4.1	8.6	36.2
USSR	--	--	--	--	--	--	--	--	--	2.3	--	2.3
Eastern Europe	--	--	--	--	--	--	--	--	0.7	1.4	0.7	1.4
China	--	23.0	--	--	--	--	--	--	--	0.2	--	23.2
North Korea	--	--	--	--	7.8	9.2	--	--	--	0.2	7.8	9.4
Free World	14.8	19.3	0.5	2.3	0	Negl.	1.7	0.9	1.5	3.1	18.6	25.6
Japan	14.8	16.7	--	--	--	Negl.	--	--	0.5	0.3	15.4	17.0
Cambodia	--	--	--	--	--	--	--	--	--	1.0	--	1.0
Other Free World	--	2.6	0.5	2.3	--	--	1.7	0.9	1.0	1.7	3.2	7.6

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Table 4
Seaborne Exports, by Flag and Commodity a/

Thousand Metric Tons

Flag	March 1970					Total	February 1970	Monthly Average Jan-Feb 1970
	Coal	Cement	Apatite	Rice	General and Miscellaneous			
<i>Total</i>	<i>14.8</i>	<i>0.5</i>	<i>7.8</i>	<i>1.7</i>	<i>2.3</i>	<i>27.2</i>	<i>55.9</i>	<i>61.8</i>
Communist	14.8	0.5	7.8	1.7	2.3	27.2	55.9	60.8
Soviet	14.8	--	7.8	--	0.5	23.1	24.0	28.3
East European	--	--	--	1.7	0.8	2.6	2.7	1.4
Chinese	--	--	--	--	--	--	27.4	24.3
Cuban	--	--	--	--	--	--	--	2.6
North Vietnamese	--	0.5	--	--	1.0	1.5	1.7	4.3
Free World	0	0	0	0	Negl.	Negl.	0	1.0

a. Identified exports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

Table 5
Ship Arrivals, by Type, Flag, and Origin
March 1970

Type/Flag	Origins					Total	February Total	Monthly Average Jan-Feb 1970
	USSR		China	Other Communist	Free World			
	Black Sea	Far East						
Total	4	21	8	2	7	42	42	41.5
Dry cargo	4	14	8	2	7	35	38	39.5
Tanker	--	7	--	--	--	7	4	5.0
Communist	4	21	4	2	7	38	36	39.5
Soviet	4	21	--	1	1	27	23	25.0
East European	--	--	--	1	1	2	2	3.5
Bulgarian	--	--	--	--	--	--	--	1.0
Polish	--	--	--	1	1	2	2	2.5
Chinese	--	--	4	--	--	4	7	6.0
Cuban	--	--	--	--	1	1	1	1.0
North Vietnamese	--	--	--	--	4	4	3	4.0
Free World	0	0	4	0	0	4	6	5.0
British	--	--	3	--	--	3	5	3.5
Somalian	--	--	1	--	--	1	1	1.0
Other	--	--	--	--	--	--	--	0.5 <u>u/</u>

a. Maltese.

Table 6
Average Number of Dry Cargo Ships in Haiphong per Day

Month	Number of Ships			
	1967	1968	1969	1970
January	7	21	24	14
February	10	23	21	17
March	16	23	21	15
April	16	19	21	
May	18	16	20	
June	25	23	18	
July	22	30	21	
August	17	28	17	
September	13	34	17	
October	13	33	15	
November	12	29	11	
December	13	27	13	
<i>Average for year</i>	15	25	18	

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Table 7
Average Layover Times
for Foreign Dry Cargo Ships Departing Haiphong a/

Month	Number of Days			
	1967	1968	1969	1970
January	12	15	25	13
February	10	27	21	14
March	13	28	17	17
April	12	19	19	
May	17	14	20	
June	22	17	21	
July	24	25	21	
August	33	31	22	
September	19	41	21	
October	19	35	19	
November	18	30	16	
December	15	29	14	
Average for year	18	25	20	

a. The average layover time for departing dry cargo ships is compiled by averaging layover times (including both the day of arrival and the day of departure) of all foreign dry cargo ships leaving Haiphong in the month. Tankers are excluded from the average because they do not compete with dry cargo ships for the limited berthing space in Haiphong.

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